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FinancialPlanning

Wealthtech Weekly

November 6, 2025

By Rob Burgess
Reporter

I returned from Financial Planning's ADVISE AI conference a few days ago. Between the jet lag and daylight saving time, I barely know what time it is.

But with our team's coverage of the event, you'll definitely know what time it is when it comes to AI in wealth management. From data to prospecting to document processing to compliance to financial planning to regulation to tech stack adoption and beyond, we've got you covered.

I hope you'll check out these articles, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Editor's note: Financial Planning is redesigning its homepage for a better reader experience. Here are the details on the upcoming changes.

Connect with Rob:

WEB SEMINAR

Serving the whole client: Why holistic wealth management is the future of advice

Hosted by Financial Planning

Partner Insights from Vanilla

November 11, 2025 | 2 p.m. ET/11 a.m. PT

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TOP STORIES

ADVISE AI

When it comes to how AI uses data, it's 'garbage in, garbage out'

It isn't just the data itself that firms should be focused on, panelists at ADVISE AI said, but how that data is connected and how relevant it still is.

- **How advisors are using AI tools for prospecting and growth**
  AI is being used not only to locate prospects, but also to help advisors show their value on the way to signing a new client.

- **How AI has taken these firms 'from PDFs to planning'**
  Panelists at the ADVISE AI conference said document processing has never been more efficient with the help of AI tools. But that doesn't mean there aren't challenges along the way.
- **Tech that looks at financial planning through a liability lens**
  Fintech platform Libretto outperformed competitors in the financial planning category in the latest T3 Survey. CEO Jeff Coyle said his strategy of slow growth and high quality was working.
- **Compliance as an AI 'brake pedal' and how firms are learning to steer**
  Firms of all sizes have had to think through the compliance concerns and rank AI tasks in order of difficulty, ADVISE AI panelists said.

Read the latest in Wealthtech

PARTNER INSIGHTS FROM EQUITABLE ADVISORS

Maintaining firm autonomy when sharing technology, people and processes

In this Q&A article with David Karr, chairman of Equitable Advisors, gain perspective on how financial advisors can leverage shared resources and lean into AI to more efficiently.

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